

# Security Settings Dashboard

SYSPRO 8

Reference Guide

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## Security Settings Dashboard

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# Security Settings Dashboard

Within SYSPRO, configuring security and ensuring consistency across various operators is a complex process that involves various programs. The **Security Settings Dashboard** lets SYSPRO administrators query operator security settings within a single program.

Things you can do in this program include:

- Query and view security information.
- Verify which operators have access (and how the access is configured) to various securable entities.
- View possible program conflicts.
- Amend security configuration in related programs via smart links.

## Exploring

### Where does it fit in?

Within SYSPRO, configuring security and ensuring consistency across various operators is a complex process that involves various programs. The **Security Settings Dashboard** lets SYSPRO administrators query operator security settings within a single program.

Things you can do in this program include:

- Query and view security information.
- Verify which operators have access (and how the access is configured) to various securable entities.
- View possible program conflicts.
- Amend security configuration in related programs via smart links.

## Navigation

- This program is accessed from the **Program List** pane of the SYSPRO menu.

*Program List > Administration > Security > Security Settings Dashboard*



# Starting

## Groups

You can restrict operator access to programs by assigning them to groups and applying access control against the group. This is configured using the **Operator Groups** program.

## Restrictions and Limits

- Because the access control settings for the elements listed below are all displayed using a single list view, we don't recommend you customize this control (e.g. adding custom columns relating to master data):
  - Warehouses
  - AR Branches
  - AP Branches
  - Banks
  - Job classifications
  - Account types
  - Contact properties
  - Contact classes
  - Contact types
  - Contact categories
  - Contact territories



# Solving

## FAQs

### What is a program conflict?

A program conflict is where permission is assigned to an operator for two or more programs which could potentially constitute a role or task conflict in your organization.

*For example:*

If access to the **AP Invoice Posting** and **Payment Cycle Maintenance** programs should never be granted to the same operator, then these programs must be listed as a pair in the `Conflict.txt` file (residing in the `\Work` folder).

If an operator is subsequently granted access to both programs, a conflict is highlighted by the system.



If the `Conflict.txt` file doesn't exist, you can generate it using the **Operator Audit** program and then use it as a starting point to define your own conflicts.

### Why are there multiple entries secured against a single operator?

The dashboard displays all permissions configured for all access combinations.

*For example:*

If an operator has five roles and four of them have access to a program, then four entries will be shown in the operator list - each with different configuration sources.

### How is the security access information built?

Security access information is built using a SQL script (`Dashboard_SSet_Info.SQL`) at the time of loading the program or selecting the **Refresh** button.

### Why is the Secured count of entities greater than the Total count?

The total figure in the **Securables** pane is sometimes more than the total number of entities because a single operator could have access defined across multiple roles.

*For example:*

A single operator could have five roles, but only four of the roles have access. This will add four to the total instead of just the one.



## Why is the number of users logged in different to the count listed in the View Users program?

Within the **Security Settings Dashboard** the count of users currently logged in is obtained from the operator table (`AdmOperator`) which indicates whether an operator is logged in (identified by the flag `LoggedInStatus`).

This flag is updated when a user logs out of SYSPRO in a controlled manner. However, the flag remains unchanged if a user disconnects due to an issue, such as a client server failure.

The list of users displayed in the **View Users** program works slightly differently as it reads in the individual entries directly from the `AdmCurrentUsers` table.



# Using

## Hints and Tips

- Use the smart links provided in the dashboard to instantly access the related program where security is configured.

*For example:*

Using the smart link provided in the **Operators** list, you can query and maintain security settings for an operator directly in the **Operator Maintenance** program.

- To refresh the information displayed in the dashboard, select the **Refresh** button from the program toolbar.

This is useful if you have changed any security configuration while the dashboard is open.



# Referencing

## Securables

Column	Description
Securable	<p>This indicates all entities that can be secured within each of your SYSPRO companies.</p> <p>As you select each securable, the subsequent detail of that entity is populated in the adjacent Report Control pane. These lists (by default) are grouped by module and remain static for all companies.</p> <p>Securables include:</p> <ul style="list-style-type: none"><li>■ System Information</li><li>■ Company</li><li>■ Programs</li><li>■ Activities</li><li>■ Fields</li><li>■ Access Control<ul style="list-style-type: none"><li>□ Warehouses</li><li>□ AR Branches</li><li>□ AP Branches</li><li>□ Banks</li><li>□ Job classifications</li><li>□ Account types</li><li>□ Contact properties</li><li>□ Contact classes</li><li>□ Contact types</li><li>□ Contact categories</li><li>□ Contact territories</li></ul></li><li>■ Electronic signatures</li></ul>
Level	<p>This indicates the level or method according to which the entities can be secured.</p>
Total	<p>This indicates the number of each entity that can be secured.</p>



Column	Description
Secured	This indicates the number of entities that are specifically secured.

# System Information

Configured security information for SYSPRO is displayed here.



Certain fields in this pane are hidden by default and can be accessed using the context-sensitive menu (CTRL+F1).

Field	Description
<b>Operator summary information</b>	
Total operators defined	This indicates the total number of operators defined in your system.
Currently logged in	This indicates the number of operators currently logged in.
Administrators	This indicates the number of operators belonging to a primary group that is set as an administrator group.
CMS Only	This indicates the number of operators defined as CMS-only users.
POS Only	This indicates the number of operators defined as POS-only users.
Espresso Only	This indicates the number of operators defined as Espresso-only users.
No password set	This indicates the number of operators who do not have a password defined.
No password expiry	This indicates the number of operators whose passwords do not expire.
Active	This indicates the number of operators who have logged in during the last 30 days.
Inactive	This indicates the number of operators who have not logged in during the last 30 days.
Never logged in	This indicates the number of operators who have never logged into SYSPRO.
No primary role defined	This indicates the number of operators who do not have a primary role defined.
<b>Role summary information</b>	



Field	Description
Total roles defined	This indicates the number of all roles defined in your system.
Primary role	This indicates the number of roles that have been defined as a primary role against an operator.
Secondary role	This indicates the number of roles only defined as a secondary role against an operator.
Program access	This indicates the number of roles configured to control program access.
Activity and field access	This indicates the number of roles configured to control activity and field access.
Access control	This indicates the number of roles configured to control access to entities such as warehouses.
Electronic signatures	This indicates the number of roles configured for electronic signatures.
Not used	This indicates the number of roles that have been configured but are not yet associated with any operators.
<b>Group summary information</b>	
Total groups defined	This indicates the number of all groups defined in your system.
Administrator	This indicates the number of groups configured as administrator.
Can logout users	This indicates the number of groups that have the ability to log out users from the system.
Primary groups	This indicates the number of groups defined as primary groups against operators.
Sub groups	This indicates the number of groups used as secondary groups against operators.
Not used	This indicates the number of groups not associated to operators in any way.
<b>License setup information</b>	This grouping of information displays standard information regarding your SYSPRO licenses.



Field	Description
<b>Password options</b>	This grouping of information displays the password options configured within the <b>System Setup</b> program.
<b>Password rules</b>	This grouping of information displays the password rules configured within the <b>System Setup</b> program.

## Company Information

Field	Description
<b>Company information</b>	This grouping of information displays general information for the company selected in the <b>Securable</b> list.
<b>Access information</b>	This grouping of information provides an overview of how security is configured for the selected company.
Operators with access to company	This indicates the number of operators defined with access to the company (i.e. users who can log on).
Program access	<p>This indicates how program access is controlled in this company:</p> <ul style="list-style-type: none"> <li>▪ <b>Group</b> Program access is configured based on the operator groups defined.</li> <li>▪ <b>Role</b> Program access is configured based on the operator roles defined.</li> <li>▪ <b>Role and Group</b> Program access is defined by both operator groups and roles, typically when you are in the process of changing your access method.</li> </ul>
Activities and fields	<p>This indicates how access to activities and fields is controlled in this company:</p> <ul style="list-style-type: none"> <li>▪ <b>Operator</b> Activity and field access is set against individual operators.</li> <li>▪ <b>Role</b> Activity and field access is set against operator roles.</li> <li>▪ <b>Role and Operator</b> Activity and field access is set against a combination of both operators and roles.</li> </ul>



Field	Description
Access control	<p>This indicates how access control (e.g. the ability to allow or deny access to one or more certain fields) has been configured for this company:</p> <ul style="list-style-type: none"><li data-bbox="628 443 1434 577">■ Operator Access control to fields has been defined against specific operators.</li><li data-bbox="628 595 1434 730">■ Role Access control to fields has been defined against operator roles.</li><li data-bbox="628 748 1434 882">■ Role and Operator Access control to fields is set against a combination of both operators and roles.</li></ul>
Electronic signatures	<p>This indicates how electronic signatures are configured for the company selected:</p> <ul style="list-style-type: none"><li data-bbox="628 1016 868 1050">■ Not configured</li><li data-bbox="628 1068 831 1102">■ System-wide</li><li data-bbox="628 1120 783 1153">■ Operator</li><li data-bbox="628 1171 906 1205">■ Operator and role</li><li data-bbox="628 1223 719 1256">■ Role</li></ul>

# Programs

 Certain fields in this pane are hidden by default and can be accessed using the context-sensitive menu (CTRL+F1).

Column	Description
Program	This indicates the program entity.
Description	This indicates the program name.
E.Net	This indicates whether the program is a business object for e.net.
Custom	This indicates whether the program is a third party custom program.
Company	This indicates the company.
Potential conflicts	When you select the programs securable, any conflicts found in the <code>CONFLICT.TXT</code> file residing in the <code>\Work</code> folder are loaded and indicated here.
Sequence	This indicates the sequence number as defined in <code>IMPPRG.IMP/CUSPRG.IMP</code> .

# Activities

 Certain fields in this pane are hidden by default and can be accessed using the context-sensitive menu (CTRL+F1).

Column	Description
Description	This indicates the activity name.
E.Net	This indicates whether the activity is applicable for a business object for e.net.
Custom	This indicates whether the activity is a third party custom program.
Company	This indicates the company.
Number	This indicates the activity number as defined in <code>IMPSEC.IMP</code> and <code>CUSSEC.IMP</code> .
Sequence	This indicates the sequence in which the entries are defined in the <code>IMP</code> files.



## Fields

 Certain fields in this pane are hidden by default and can be accessed using the context-sensitive menu (CTRL+F1).

Column	Description
Description	This indicates the field name.
E.Net	This indicates whether the field is applicable for a business object for e.net.
Custom	This indicates whether the field is a third party custom program.
Company	This indicates the company.
Number	This indicates the activity number as defined in <code>IMPSEC.IMP</code> and <code>CUSSEC.IMP</code> .
Sequence	This indicates the sequence in which the entries are defined in the <code>IMP</code> files.



## Users

This pane displays the operators, roles and groups that have access to the securables displayed in the Report Control pane.

The content displayed depends on the securable selected:

Column	Content displayed
System information	<ul style="list-style-type: none"><li>■ Displays all operators, excluding system operators (i.e. prefixed with "__").</li><li>■ Displays all roles defined in the system and the operators linked to those roles.</li><li>■ Displays all groups defined in the system and the operators linked to those groups.</li></ul>
Company information	<ul style="list-style-type: none"><li>■ Displays all operators with access to the company (excluding system operators).</li><li>■ Displays all groups (and the associated operators) who have access to the company.  If none of the associated operators have access to the company then <code>No operators</code> is displayed against the group.</li><li>■ Displays all roles (and the associated operators) who have access to the company.  If none of the associated operators have access to the company then <code>No operators</code> is displayed against the role.</li></ul>

Column	Content displayed
Program access	<ul style="list-style-type: none"> <li>■ Displays all operators who have access to the program selected, as well as the type of access. If the primary group is an administrator group then the Configuration will show <code>Administrator</code>.</li> <li>  An operator can be listed multiple times if access is by role. <i>For example:</i> An operator can have three roles defined, with two of those roles having access. The operator is then listed twice, each time with a different configuration. </li> <li>■ Displays all roles with access to the program as well as the operators linked to the role. Nothing is displayed if program access is not defined by role either by role or at system level.</li> <li>■ Displays all groups with access to the program as well as the operators linked to that group.</li> </ul>
Activities	<ul style="list-style-type: none"> <li>■ Displays all the operators who have access to the selected activity as well as the configuration that allows this access (Operator or Role).</li> <li>  An operator can be listed multiple times if access is by role. <i>For example:</i> An operator can have three roles defined, with two of those roles having access. The operator is then listed twice, each time with a different configuration. </li> <li>■ The <b>Roles</b> pane displays all roles with access to the activity, as well as any operators associated with the role. Nothing is displayed if activities are not secured by role.</li> <li>■ The <b>Groups</b> pane is not loaded as groups are not relevant.</li> </ul>



Column	Content displayed
Fields	<ul style="list-style-type: none"><li>■ Displays all operators who have access to the selected activity as well as the configuration that allows this access (Operator or Role).</li></ul> <p> An operator can be listed multiple times if access is by role.</p> <p><i>For example:</i> An operator can have three roles defined, with two of those roles having access. The operator is then listed twice, each time with a different configuration.</p> <ul style="list-style-type: none"><li>■ The <b>Roles</b> pane displays all roles with access to the activity as well as any operators associated with the role.</li></ul> <p>Nothing is displayed if fields are not secured by role.</p> <ul style="list-style-type: none"><li>■ The <b>Groups</b> pane is not loaded as groups are not relevant.</li></ul>
Access Control	<ul style="list-style-type: none"><li>■ Displays all operators who have access to the selected entity as well as the configuration that allows this access (Operator or Role).</li></ul> <p> An operator can be listed multiple times if access is by role.</p> <p><i>For example:</i> An operator can have three roles defined, with two of those roles having access. The operator is then listed twice, each time with a different configuration.</p> <ul style="list-style-type: none"><li>■ The <b>Roles</b> pane displays all roles with access to the entity as well as any operators associated with the role.</li></ul> <p>Nothing is displayed if access control is not secured by role.</p> <ul style="list-style-type: none"><li>■ The <b>Groups</b> pane is not loaded as groups are not relevant.</li></ul>

Column	Content displayed
Electronic signatures	<ul style="list-style-type: none"> <li>Displays all operators who have access to a function controlled by the electronic signature, as well as the configuration that allows this access (System-wide, Company, Group, Role or Operator).</li> </ul> <p> An operator can be listed multiple times if access is by role.</p> <p><i>For example:</i> An operator can have three roles defined, with two of those roles having access. The operator is then listed twice, each time with a different configuration.</p> <ul style="list-style-type: none"> <li>The <b>Roles</b> pane displays all roles with access to the entity as well as any operators associated with the role. Nothing is displayed if electronic signatures is not secured by role.</li> <li>The <b>Groups</b> pane is loaded with any groups against which electronic signatures have been defined.</li> </ul>

## Operators

-  Certain fields in this pane are hidden by default and can be accessed using the context-sensitive menu (CTRL+F1).

Column	Description
Operator	This indicates the operator code.
Name	This indicates the operator name.
Primary role	This indicates the primary role of the operator.
Primary group	This indicates the primary group of the operator.
Administrator	This indicates whether the operator's primary group is an administrative group.
Configuration	This indicates how the operator's access is defined (e.g. by role).
Alternate roles	If the operator has multiple roles then this column displays a comma-separated list of the alternate roles.



Column	Description
Analytics admin	This indicates whether the operator is flagged as an Analytics administrator.
Browse only	This indicates whether the operator is only allowed browse access to a program (only relevant when viewing program access).
CMS only	This indicates if the operator is a contact management user only.
Conflicts	If the operator has access to programs which are in conflict with the one selected, then this column indicates a list of the programs which may be in conflict (only relevant when viewing program access).
Espresso	This indicates if the operator is an Espresso user.
Job logging	This indicates if job logging is required (only relevant when viewing program access).
Last login	This indicates the operator's last login date and time.
Locked	This indicates whether the operator's account has been locked.
POS only	This indicates whether this is a POS-only user.
Password expiry	This indicates whether the operator's password has an expiry date.
Password reqd	This indicates whether the operator has a password defined.
Report designer	This indicates whether the operator is allowed to design reports.
Role 2 - 5	This indicates the name of alternate roles defined for the operator.
Role Designer	This indicates whether if the operator is allowed to design roles.
Subgroups	If subgroups are defined for the operator, then this column displays a comma-separated list of those sub groups.

## Roles

-  Certain fields in this pane are hidden by default and can be accessed using the context-sensitive menu (CTRL+F1).

Column	Description
Role and operator	This indicates the role name. All associated operators to that role are displayed.
Operator	This indicates the operator code.
Primary role	This indicates the primary role defined for the operator.
Roles 2 – 5	This indicates the secondary roles defined for the operator.
Access control	This indicates whether access control is set against the role.
Activities and fields	This indicates whether activity and field access is configured against the role.
Program access	This indicates whether program access is configured against the role.
Role code	This indicates the role code in the role table.
User interface	This indicates whether the option to maintain the user interface is defined for the role.
Workflow	This indicates whether Workflow is configured for the role.
eSignatures	This indicates whether electronic signatures are defined against the role.

## Groups

-  Certain fields in this pane are hidden by default and can be accessed using the context-sensitive menu (CTRL+F1).

Column	Description
Group and operator	This indicates the group name. All operators associated with that group are displayed below.
Operator	This indicates the operator code.



Column	Description
Primary group	This indicates the primary group defined against the operator.
Subgroups	This indicates a comma-separated list of any subgroups defined against the operator.
Administrator	This indicates whether the group is defined an administrator group.
Group code	This indicates the group code.
Logout users	This indicates whether the group can log out users.



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